Welsh Development Agency
Bridgend County Borough Council

BRIDGEND

a comparative assessment of major potential employment sites in the borough

VOLUME 1: MAIN TEXT

November 2001

*Wyn***Thomas***Gordon***Lewis Limited**
In association with
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1.0 Introduction

1.1 Brief

1.1.1 WynThomasGordonLewis Limited has been appointed by the Welsh Development Agency and Bridgend County Borough Council to carry out a comparative evaluation of thirteen potential major employment sites in the Bridgend area.

1.1.2 The brief comprised three main parts:

- To identify current and prospective demand for various types of employment land in Bridgend County Borough for the period 2001-2006 and the main gaps in supply for the same period.

- To develop a methodology for evaluating the sites and a clear scoring system.

- To gather all relevant information on the sites from existing sources and, where necessary and practicable, to source new data.

1.1.3 The aim of the study is to establish priorities and recommendations for public sector involvement in the development of future major employment sites in the Borough.

1.2 Consultancy team

1.2.1 The team comprises the following consultants:

Lead consultant:	WynThomasGordonLewis Limited 21 Park Place Cardiff CF10 3DQ
Chartered Surveyors:	Cooke & Arkwright 7-8 Windsor Place Cardiff CF10 3SX
Consulting Engineers:	Clarke Bond 63-69 Cardiff Road Taffs Well Cardiff CF14 7RD
Quantity Surveyors:	Lee Wakemans 4 Park Court Mews Park Place Cardiff CF10 3DQ

1.3 The sites

1.3.1 The thirteen sites identified in the brief and considered as part of this study are:

1. Pencoed Technology Park, Pencoed (37.8 ha/93.4 acres)
2. The Triangle, Pencoed (13.1 ha/32.4 acres)
3. Waterton Industrial Estate (Site A) (4.0 ha/9.9 acres)
4. Waterton Industrial Estate (Site B) (3.8 ha/9.4 acres)
5. Brocastle (46.7 ha/115 acres)
6. Land adjoining the Ford Factory (11.7 ha 28.9 acres)
7. Island Farm (13.4 ha/33.1 acres)
8. Brackla Industrial Estate (27.5 ha/68 acres)
9. Sarn Park (65.1 ha/160.9 acres)
10. Land at Tondu (31.4 ha/76.6 acres)
11. Ty Draw Farm, North Cornelly (6.2 ha/15.3 acres)
12. Llynfi Power Station (18.8 ha/46.5 acres)
13. Wern Fawr (54.9 ha/135.7 acres)

1.3.2 The location of these sites is illustrated in the plan overleaf. The boundaries of the individual sites that have been considered as part of this study are shown on the plans contained in **Section 11.0** and were agreed by the client group at the start of the study. For a number of reasons, including landownership and local government administrative boundaries, the sites do not always correspond exactly with those that are shown as being allocated for employment purposes in the development plan or in the emerging *Bridgend Unitary Development Plan*.

1.4 Sources of information

1.4.1 In preparing this report, we have compiled information from a variety of different sources, drawing upon existing knowledge of the sites within the project team and a review of the reports that have been prepared by the WDA and other consultants. The level of existing information on the sites varied considerably from an extensive body of knowledge for some sites to very little information for others. As a result, we have also consulted with the following organisations:

- Welsh Development Agency
- Bridgend County Borough Council
- Glamorgan Gwent Archaeological Trust
- Countryside Council for Wales
- Environment Agency
- Cadw: Welsh Historic Monuments
- National Assembly for Wales
- Vale of Glamorgan Council
- Public utilities
- DTZ
- Macob Projects Limited
- Groundwork Bridgend
- Granchester plc

1.4.1 Documents on which we have relied in preparing this study are listed in **Section 10**.

2.0 Demand and supply of employment land

2.1 Introduction

This section gives an assessment of the supply and demand for employment land and commercial premises within Bridgend County and sets out conclusions on future needs. It relates this assessment to the wider South Wales industrialised area. It draws on data collected by the International Division of the Welsh Development Agency (WDA), the Planning and Economic Development departments of Bridgend County Borough Council and Cooke & Arkwright's own research dept. Use was also made of relevant published reports and informal consultations were held with commercial agents active in the Bridgend area. The assessment initially considers the position in the context of South Wales and then focuses on the Bridgend area.

2.2 South Wales Area

Supply

2.2.1 The supply of sites and premises in the South Wales area as at 1st April 2001 as seen in figures supplied by the WDA are discussed below.

Employment Land

2.2.2 A total of 277 sites were available as shown in **Table 1**. 119 of these were small sites of less than 5 acres and 69 were bigger than 20 acres.

Table 1
Employment Land Supply: South Wales Area

Table 1	
Size Band (acres)	No of Sites
0-5	119
5-10	46
10-15	26
15-20	17
20-25	10
25-50	24
50-100	23
100+	12
TOTAL	**277**

2.2.3 Although these sites were being promoted in some way they were not necessarily free of constraints. A study by the South East Wales Economic Forum in 1999 found that a total of 3,920 acres (1,600 hectares) on 416 sites were available across the area but fewer than half of these were available for immediate development. (This is defined as being without constraints, except for planning, where construction can start within 3 months.) Bridgend, Newport and Caerphilly had the highest percentage that could be developed in the short term but across the whole area there were only four sites in excess of 20 acres that were immediately available for large-scale inward investors.

Industrial Property

2.2.4 The amount of vacant industrial space within the South Wales area over the last 10 years shows the typical peaks and troughs of an economic cycle with the past five years having been difficult ones both nationally and regionally. See **Figure 1**.

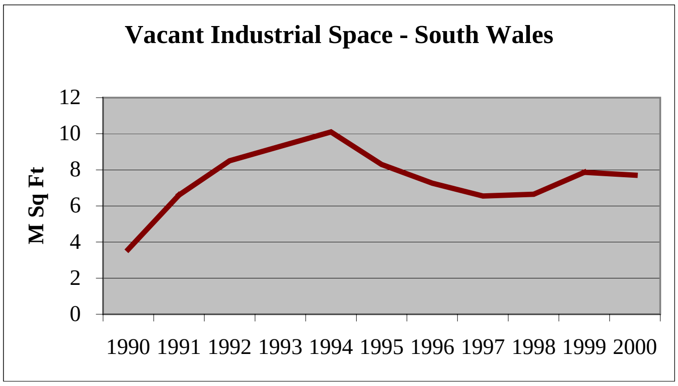


Figure 1 Source: Cooke & Arkwright Research

2.2.5 In 2000 there was a total of 7.7 m sq ft of industrial property available across South Wales. Although the figures are not directly comparable with the total floorspace available **Table 2** shows the number of industrial properties available by size band.

Table 2
Number of industrial properties available by size band: South Wales area

Table 2	
Size Band (sq ft)	No of Properties
<5k	277
5-10k	122
10-15k	48
15-20k	21
20-25k	27
25-50k	60
50-100k	23
100k+	18
TOTAL	**596**

Offices

2.26 Traditionally the office market in Wales has been dominated by Cardiff, Newport and Swansea. Together, these three areas had, in 1995, 50% of all the commercial offices in Wales. In contrast Bridgend had just 3%.

2.2.7 Vacant office space in these three main centres has risen from 700,000 sq ft in 1990 to 1.1 m sq ft in 2000. Cardiff alone currently has in excess of 0.75 m sq ft of offices available, Bridgend has around 70,000 sq ft vacant. See **Figure 2**.

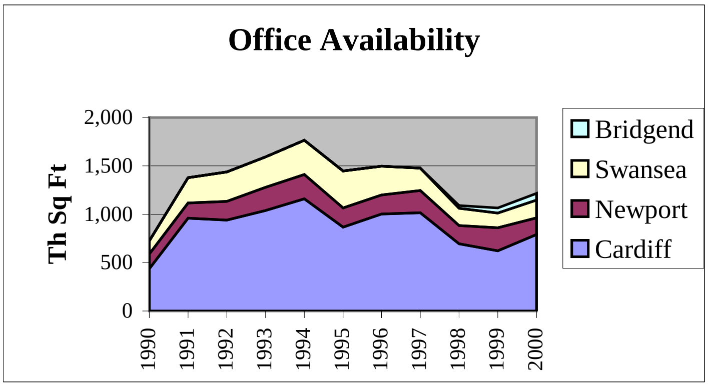


Figure 2 Source: Cooke & Arkwright Research

2.2.8 The WDA figures show the number of vacant offices by size band. See **Table 3**.

Table 3
Number of vacant offices by size band: South Wales Area

Table 3	
Size Band (sq ft)	No of Properties
<5k	236
5-10k	41
10-15k	15
15-20k	9
20-25k	6
25-50k	12
50-100k	4
100k+	3
TOTAL	**326**

Demand

2.2.9 The WDA also monitors enquiries for employment land and premises throughout Wales. A proportion of these will eventually become secured projects but experience suggests that the conversion rate can be quite low and that the time taken is quite long. This section on demand across the South Wales area uses the WDA enquiry figures for the year ending March 2001 as an overall demand indicator. During this time 34 employment projects were secured for South Wales with four of these being located in Bridgend.

Employment Land

2.2.10 There were 422 enquiries for land during the year. **Table 4** shows the breakdown by size band and shows that there were almost 30 enquiries for sites of 20 acres or more. Almost 70% of all enquiries were for sites of less than 5 acres.

Table 4
Number of enquiries for employment land: South Wales Area

Table 4	
Size Band (acres)	No of Enquiries
0-5	287
5-10	55
10-15	28
15-20	23
20-25	6
25-50	6
50-100	11
100+	6
TOTAL	**422**

Industrial Property

2.2.11 There were 1,260 enquiries for industrial premises during the year. The breakdown by size band is shown in **Table 5**. Over 40% of the enquiries were for premises of less than 10,000 sq ft but there were more than 50 enquiries for properties of over 100,000 sq ft.

Table 5
Number of enquiries for industrial premises: South Wales Area

Table 5	
Size Band (sq ft)	No of Enquiries
<5k	309
5-10k	240
10-15k	120
15-20k	189
20-25k	64
25-50k	201
50-100k	87
100k+	53
TOTAL	**1,263**

Offices

2.2.12 The WDA received just over 600 enquiries for offices during the year. More than 60% of these were for premises of less than 10,000 sq ft. There were only nine enquiries for offices larger than 50,000 sq ft (**Table 6**).

2.2.13 At the larger end of the market, a report by Deloitte & Touche shows that Wales as a whole attracted 18% of all call centre investments in the UK and Ireland in 2000. This amounted to 11 secured projects and ranked Wales as third favourite, up from seventh last year. Lloyds TSB have recently been attracted to Bridgend to occupy a 50,000 sq ft call centre on land adjacent to Sony.

Table 6
Number of enquiries for offices: South Wales Area

Table 6	
Size Band (sq ft)	No of Enquiries
<5k	287
5-10k	111
10-15k	55
15-20k	51
20-25k	31
25-50k	70
50-100k	8
100k+	1
TOTAL	**614**

Balance Between Supply and Demand

2.2.14 The balance (**or imbalance**) between supply and demand based on these sets of results is shown in **Figures 3-5**. Whilst it will not ensure a definitive picture, it is helpful in identifying the balances and imbalances across the different sectors and size brackets.

Employment Land

2.2.15 For small sites of less than 5 acres the supply could only meet half the demand. For sites of 5-20 acres supply and demand were more or less in balance but for sites over 20 acres there was twice as much supply as demand.

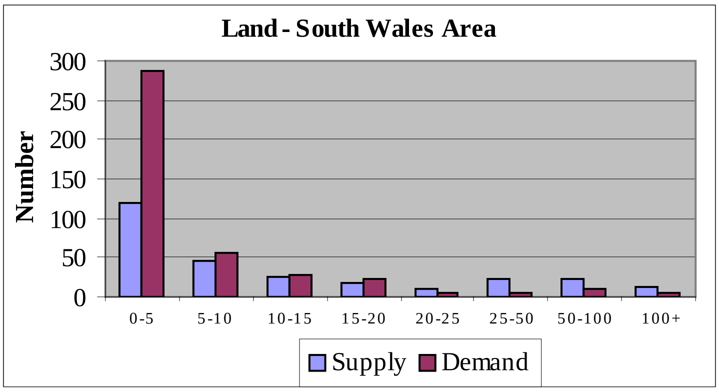


Figure 3 Source: WDA

Industrial Property

2.2.16 For industrial premises demand exceeded supply in all size categories but there was a particular shortage of units in the 15-20,000 sq ft and 25-50,000 sq ft ranges.

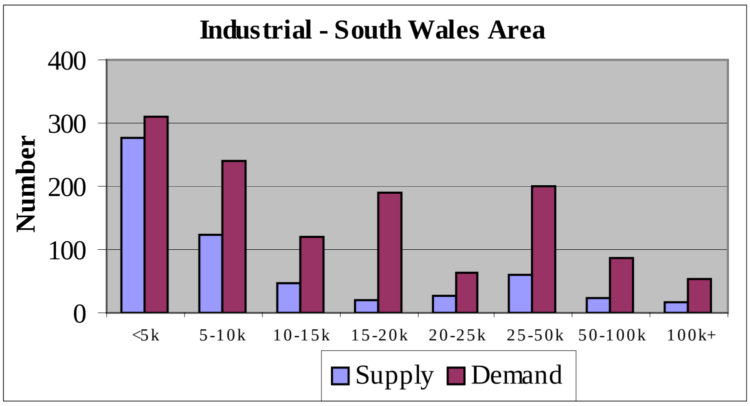


Figure 4 Source: WDA

Offices

2.2.17 Demand exceeded supply in all size categories except the largest (100,000 sq ft and over). The greatest mismatch was in the 25-50,000 sq ft range where there were 70 enquiries for offices but only 12 properties on offer.

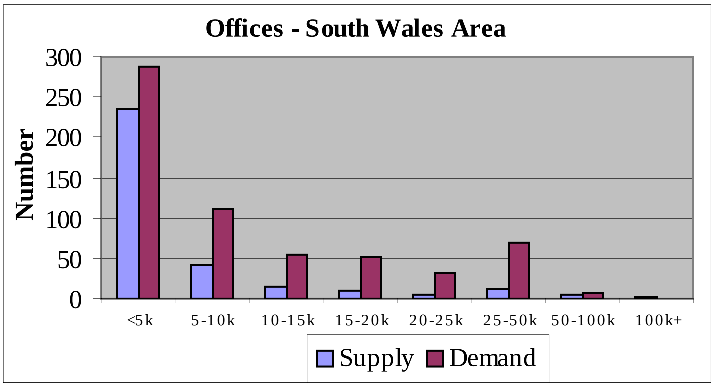


Figure 5 Source: WDA

Types of Demand

2.2.18 Demand can generally be split into two types, indigenous local or regional and inward investment. Both are likely to be affected by the recent downturn in manufacturing. The CBI's Industrial Trends Survey reports continuing falls in both the domestic and export markets and this will have an effect on demand for both land and premises across the area in the medium term. This effect may not be entirely negative but may, instead, indicate a shift in emphasis. The closure of the Corus steel works, for example, may lead to an increase in local demand for smaller business units as redundant workers are encouraged into new enterprises.

2.2.19 Inward investment projects are often (but not always) larger and driven by the availability of grant aid. Until recently Newport and Cardiff have attracted many of the inward investment projects secured for Wales. Newport benefited from its perceived proximity to UK markets and Cardiff benefited from its profile as the capital of Wales and its large catchment population. Both are now affected by their lack of grant aid. In the future such projects are more likely to go to other areas of South

Wales, such as Bridgend and the Valleys area, which are within the Objective 1 boundary.

2.3 Bridgend Area

Supply

Employment Land

2.3.1 In Bridgend in recent years the supply of employment land classed as available for immediate development has remained relatively high. In 1989 only 35 acres (14 ha) was immediately available but this rose steadily to a peak of 235 acres (95 ha) in 1999 (**see Fig 6**). 165 acres (67 ha) was available in June 2001. With recent take-up estimated at 25 acres (10 ha) per year there is a large supply of available land.

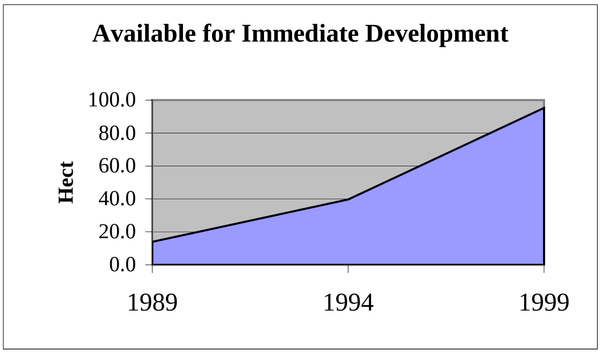


Figure 6 Source: Bridgend CBC

2.3.2 A total of 370 hectares (914 acres) of land on 29 sites is currently allocated for employment purposes. Of this 165 acres (67 ha) on 13 sites is available for immediate development. **Table 7** shows these sites by size band. They are evenly distributed across the size bands but there is no 50 acre plus site.

Table 7
Employment sites available for immediate development: Bridgend Area

Table 7		
Size Band (acres)	No of Sites	Total Acres
0-5	6	12.8
5-10	2	18.2
10-20	2	30.9
20-50	3	102.7
50+	0	0.0
Total	13	164.6

Industrial Property

2.3.3 On average, in recent years, Bridgend has had 6% of the industrial space vacant in the South Wales area but the amount has risen faster in Bridgend than the rest of South Wales. While there has been a 50% increase in Bridgend over the last 5 years the rest of South Wales saw only a 4% increase. **Figure 7** shows the increase in Bridgend over the last 4 years by size band.

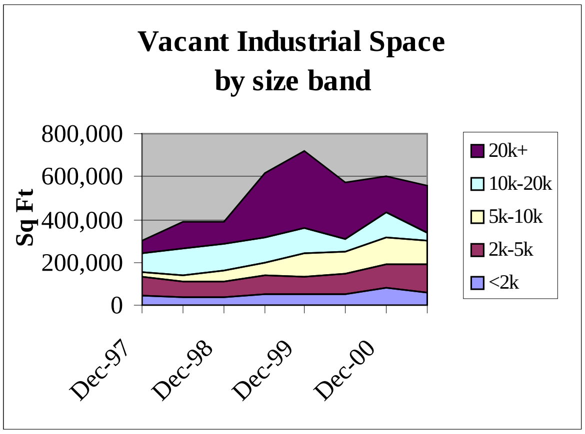


Figure 7 Source: Bridgend CBC

2.3.4 The largest increase has been in units of 5-10,000 sq ft where availability has increased by more than 500%. In 1997 there was only 17,000 sq ft available in this category but by June 2001 this had risen to 111,000 sq ft. There has also been a big increase in the largest sizes (over 20,000 sq ft). In 1997 56,000 sq ft were available in this category but by 2001 this had increased nearly 300% to 223,000 sq ft. However, there has been a fall in available units in the 10-20,000 sq ft band. Here the amount of space available has fallen from 90,000 sq ft to 34,000 sq ft.

2.3.5 In July 2001, Bridgend Council recorded 117 industrial units vacant in Bridgend totalling 560,000 sq ft. **Table 8** shows the breakdown by size bands.

Table 8
Number of vacant industrial units: Bridgend Area

Table 8		
Size Band (sq ft)	No of units	Sq Ft
<2k	50	58,272
2k-5k	41	133,987
5k-10k	17	111,365
10k-20k	3	34,066
20k+	6	222,839
Total	117	560,529

Offices

2.3.6 In Bridgend, the majority of office space is located in the town centre and is traditionally let in small suites to local businesses or in larger sizes to public sector organisations and the utilities. Between 1998 and 2001 vacant space in Bridgend more than doubled from 38,000 sq ft to 79,000 sq ft but in the major South Wales centres vacant office space fell.

2.3.7 A total of 26 units are currently available in Bridgend but only four offer accommodation of over 5,000 sq ft. See **Table 9**.

Table 9
Available office accommodation: Bridgend area

Table 9		
Size Band (sq ft)	No of units	Sq Ft
<1k	7	2,359
1k-2k	7	8,622
2k-5k	8	20,243
5k-10k	1	7,636
10k+	3	40,050
Total	26	78,910

2.3.8 The smaller suites, below 5,000 sq ft, are older and are available in commercial centres and on industrial estates such as Bridgend Industrial Estate and Village Farm. The larger units comprise one suite at the Science Park, one old building in need of redevelopment (the former Post Office on Court Road) and two phases of a new development at Tremains Road which is currently under construction.

Demand

2.3.9 Figures collected by the WDA show that 34 employment projects were secured for the South Wales area in the year to March 2001. Four of those (12%) were located in the Bridgend area. This was an improvement on the previous two years when 5% (2 out of 44) and 8% (4 out of 50) of secured projects went to Bridgend. Electronics, the automotive industry and call centres were active sectors in all three years for the South Wales area and Bridgend has also been successful in these areas, in some cases over a long period.

2.3.10 The total number of enquiries for land and premises received by the County Council over the last four years is shown in **Figure 8**. On average about 40 % of all enquiries are from local businesses. The other 60% come from outside the county.

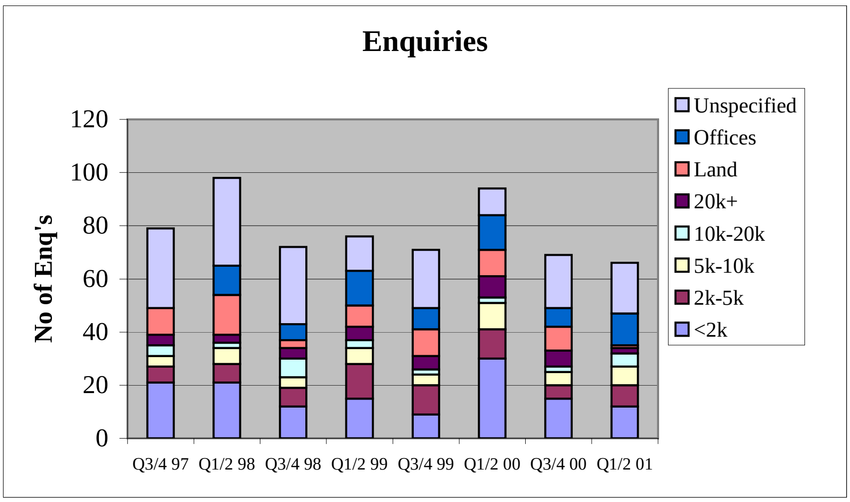


Figure 8 Source: Bridgend CBC

2.3.11 During the first half of 2001 66 enquiries for land or property were received by the Council (**Figure 9**). This is considerably down on the half yearly average of 78 and a higher than usual proportion (48%) of these were from businesses already within the area.

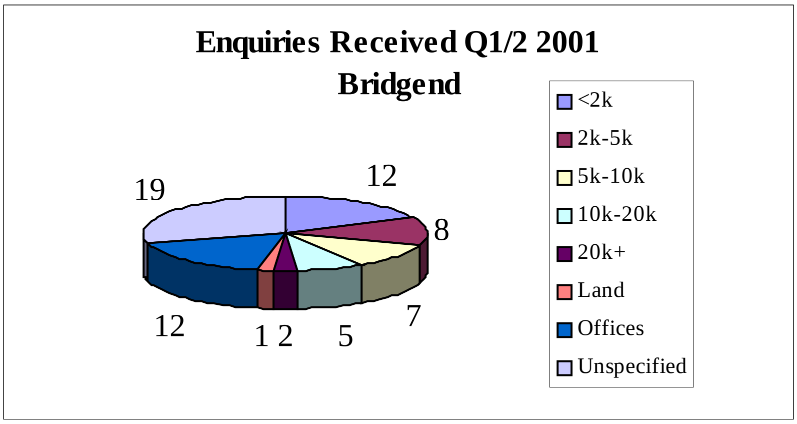


Figure 9 Source Bridgend CBC

Employment Land

2.3.12 The Unitary Development Plan for Bridgend identifies historic take-up of employment land to be in the range 15-23 hectares (37-57 acres) per annum. This was based on the total area of developed land and an assumed timescale of the last 20-30 years over which the development took place. It would include the effect of the WDA advanced factory programme and major inward investment. Although the availability of employment land can be tracked over the last 10 years or more this reflects new allocations and changes in status rather than take-up. More recent figures estimate that a maximum of 10 hectares (25 acres) a year have been taken up for employment purposes and this reflects, we believe, an underlying trend.

2.3.13 Most recently, 2 hectares (5 acres) close to the Pencoed Technology Park has been taken for a 50,000 sq ft call centre for Lloyds TSB and although a site in excess of 27 acres adjacent to the Ford factory has been ear-marked for a business park and new regional HQ for Lidl, construction has not yet started.

Industrial Property

2.3.14 The highest proportion of enquiries (from those who were specific) has been for industrial premises of less than 5,000 sq ft. The agents' perception is that demand for Bridgend property has slackened in recent years and the perception of the stock is mediocre with locational preferences between estates and different parts of the county being expressed.

Offices

2.3.15 Demand for offices has averaged 10 enquiries per half year. New offices built out of town on the Bridgend Industrial Estate in 1991/92 proved slow to let. However, recent additions to the office stock have let well. These include 7,000 sq ft at Court House, Derwen Road let to Hyder and 7,000 sq ft at North Court at the rear of Bridgend Industrial Estate let to the Health Authority. Agents are also in discussion with two applicants who between them may take 75% of the 30,000 sq ft of office space being constructed on Tremains Road.

2.3.16 Demand is perceived as being fairly buoyant and is being driven by circumstances within the town. Local professionals who signed up for long leases in the town centre when there was no alternative are now looking to upgrade their space. Parking and road access are seen as particular problems within the town and the end of a lease is seen as an opportunity to move to a more modern building possibly in a more peripheral location.

Balance Between Supply and Demand

2.3.17 **Figure 10** compares supply (measured as available units) and demand (measured as enquiries) within the Bridgend area using data supplied by Bridgend County Borough Council. As in the South Wales wide view, it will not be definitive but is helpful in identifying the balances and imbalances across the different sectors and size brackets.

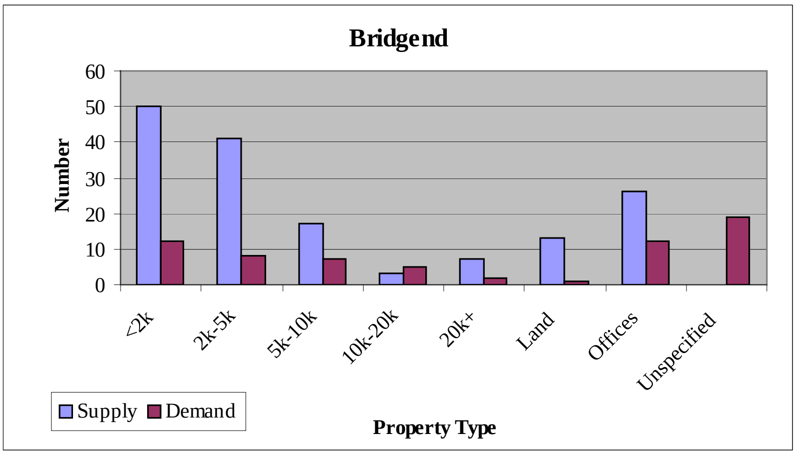


Figure 10 Source: Bridgend CBC

Employment Land

2.3.18 The supply of land exceeds demand. Take-up in recent years is estimated to be in the region of 25 acres per year and there are currently 71 acres available for immediate development. However there are other issues involved in matching supply with demand. For instance, the western side of the County is perceived as less popular being of greater interest to businesses serving West Wales.

2.3.19 There are some serious enquiries around but there is a mismatch between demand and supply on the question of tenure. Demand is coming from local businesses that want to buy land on a freehold basis or on a long leasehold with a peppercorn rent. They want to build their own unit, typically 10,000 sq ft, for storage, distribution or quasi trade counter operations. Landowners on the more popular estates, on the other hand, want to let the land/premises with regular rent reviews.

2.3.20 The type of site needed to satisfy indigenous and inward investment demand may be quite different. Inward investment sites (or prestige sites for larger local investors) are typically large, well connected to the motorway and have a high profile. Smaller local occupiers have other priorities. Some like to be grouped on a successful estate and there always needs to be a place for "bad neighbour" type operations.

Industrial Property

2.3.21 The supply of industrial premises exceeds demand in all size categories except 10-20,000 sq ft. Although the condition of some of the units is poor, a range of qualities is seen as being important in offering prospective occupiers a choice.

Offices

2.3.22 Generally the quantity of office space available exceeds demand but discussions with commercial agents reveal that there is a mismatch between supply and demand in the quality of available space and of some pent up demand for more modern, better located properties. The poor quality of existing town centre space means local occupiers are looking to upgrade to modern buildings with good parking.

2.4 Summary

- In general terms, current overall supply levels are adequate. However the supply issue is one of the quality of supply to match demand expectations irrespective of whether land or buildings, industrial or offices, are being considered.

- Demand is a greater issue as it seems to be at a lower level than expected when compared to the wider South Wales area. This raises issues such as Bridgend's profile viz-a-viz the Valleys and the M4 corridor and the motivating factors behind enquiries. The availability of Objective 1 funding will help and is being actively promoted. Bridgend's proximity to Cardiff and the M4 means that it is not automatically associated with "West Wales and the Valleys" when grant aid and other factors are being considered by potential occupiers. However the availability of this aid means that opportunities should exist to attract major inward investment in both the industrial and office sectors. An attractive and appropriate supply of serviced sites would need to be provided to capitalise on these opportunities and to continue Bridgend's record in securing investment from certain sectors.

- Stimulating demand could be addressed by Council and government agencies in greater promotion of Bridgend and its advantages as an employment location but also by supply led policies, addressing the quality and attractiveness of the existing and future employment property.

- Relevant to this work and relating to the supply side is the perception of the existing employment premises stock in Bridgend and the opportunity for new buildings. Bridgend's development peaks and popularity with occupiers was in the 1970's and 1980's but that stock is now ageing and added to an ever older existing stock. This combination of the perception of serviced site opportunities and existing stock may well be dampening demand.

2.5 Conclusions

2.5.1 The following conclusions on future needs have been reached taking into account the recent performance of the Bridgend County Borough area in terms of both demand and supply of employment land and property. They also reflect the longer term past performance.

Land

- The overall supply of employment land is more than adequate based on past take up rates and current demand levels.

- The level of servicing, status and profile of sites, however, will influence levels of demand. Prioritisation between sites must take place to focus resources on improving site quality.

- Past take up rates indicate that Bridgend has benefited from windfall large scale industrial take up due to either major inward investment or indigenous expansion. An issue is whether allowance for this scale of development needs to be made in the future possibly as part of a wider range of such sites across South Wales.

- Allowance for it could be made by the identification and servicing of a site best suited to large-scale industrial inward investment but on the basis that it could be sub-divided in the future if that single-user take up does not transpire. This would be up to 50 acres and be able to accommodate industrial inward investors. It could also accommodate, if sub-divided, industrial or warehousing units requiring in excess of 10 acres, for which there is occasional demand.

- The supply of medium sized industrial units is currently good but this could be affected by medium term improvements in the industrial sector and demand levels. With no advance factory programme in place, the provision of a fully serviced site aimed at medium size units of 25,000 - 100,000 sq ft on up to 10 acre sites, but also potentially smaller scale units, may be needed.

- There is unsatisfied demand for smaller sized freehold plots of 1 - 5 acres serving the local market and capable of accommodating 5,000 - 25,000 sq ft units.

- There is no strong demand for land for distribution purposes although there are occasional requirements such as from Lidl, L'Oréal or Georgia Pacific for major warehousing developments. These could be accommodated if desired on either the broken up inward investment site or the medium-sized unit site.

Industrial Property

- There is currently a good supply of industrial units compared with demand levels. This is subject to the comments above on medium sized and owner occupied smaller units.

- The applicants and agents perceptions may be helpful in this regard where the profile and image of existing estates is of mixed quality with a preference for estates on the eastern side of the county and those more modern, higher quality, estates.

- The perception of estates in the west of the borough is that they are of less appeal and more westward in their orientation.

Offices

- There are indications of a mismatch of supply and demand in the office market and of some pent up demand for more modern, better located properties. The poor quality of existing town centre space means local occupiers are looking to upgrade to modern buildings and the amount of older vacant space may be a permanent item.

- In the wider area demand from larger office projects (especially call centres) is now moving out from traditional centres to increase in areas, such as Bridgend, with higher grant aid available and less pressure on skills and salaries.

- Provision of sites to accommodate both types of demand should be considered.

- The WDA policy on technology led development is being developed across Wales. Bridgend has had a limited role in this sector in recent years although the Science Park originally targeted that sector. If the policy is to be pursued to stimulate demand in this sector and place it in the Bridgend area then it will require the establishment of a high quality business park/campus with incremental development of offices.

3.0 Site profiles

Ordnance Survey plans showing the boundaries of the sites area included in **Section 11**.

3.1 Pencoed Technology Park, Pencoed
NGR SS970807
Site size 37.8 ha/93.4 acres
Ownership: Bridgend County Borough Council and Rhondda Cynon Taff County Borough Council

3.1.1 The site is strategically located alongside and is visible from the M4 motorway, to the north-east of junction 35. The town of Pencoed lies to the west, while Bridgend lies approximately 5 miles to the south-west. The northern and eastern boundaries of the site are enclosed by Felindre Road, while the southern boundary is defined by the M4. In the west, the site's boundary is formed by the Ewenny Fach river and the existing limit of development at the Pencoed Technology Park. The Ewenni Fach also forms the administrative boundary between Bridgend County Borough and Rhondda Cynon Taff County Borough. The majority of the site lies within Rhondda Cynon Taff County Borough to the south of the river and only a small area to the north falls within the jurisdiction of Bridgend County Borough. The site is currently in agricultural use.

3.1.2 Beyond the site in the north, east and south is open countryside, predominantly in agricultural use. This area contains a number of isolated farm buildings, plus the hamlets of Felindre and Llanilid. Closeby, is the former Llanilid Opencast Mine, owned by Celtic Energy, and currently being restored. Part of that site is allocated in the *Taff Ely Local Plan* for special employment purposes and is the subject of a recently announced proposal for a major development

3.1.3 A narrow unclassified land, Pantruthin Lane, runs through the site from Felindre Road in the east to Pantruthin Fawr in the west. It is currently an adopted highway. We understand that the Council has received a request from the private landowner of Pantruthin Fawr to extinguish the highway.

3.2 The Triangle, Pencoed
NGR SS957804
Site size 13.1 ha/32.4 acres
Ownership: Macob Projects Limited/private owner

3.2.1 The site is strategically located alongside the M4, immediately to the south-west of junction 35. It is fully enclosed by existing roads, the M4 and the A473, as well as several residential properties along Coychurch Road. The site is generally flat and low-lying, comprising the floodplain of the Ewenny River and is currently in agricultural use. The Ewenny River runs north-east/south-west through the site. Overhead lines cross the site and two underground sewers also run through the site. The site is well screened from the A473 by mature trees. The trees along the site's boundaries and along the river are protected by Tree Preservation Orders.

3.3 Waterton Industrial Estate (Site A)
NGR SS939785
Site size 4.0 ha/9.9 acres
Ownership: Welsh Development Agency/private owner

3.3.1 The site is located on the edge of the Waterton Industrial Estate on the south-eastern outskirts of the urban area of Bridgend. The site straddles the administrative boundary between Bridgend County Borough and the Vale of Glamorgan, with the eastern third being located within the Vale of Glamorgan. The site is flat and roughly square in shape. Residential properties in the village of Treoes adjoin the eastern boundary of the site. Existing industrial units and vacant land on the industrial estate adjoin the site in the north and west. The southern boundary is formed by a lane, which carries public footpath no. 7 Llangan, and open countryside beyond. A number of mature trees enclose the northern boundary. The site does not have a current access point, but a suitable access could be easily provided from the existing estate road and roundabout.

3.4 Waterton Industrial Estate (Site B)
NGR SS940786
Site size 3.8 ha/9.4 acres
Ownership: Welsh Development Agency

3.4.1 The site is located on the edge of the Waterton Industrial Estate on the south-eastern outskirts of the urban area of Bridgend. The site straddles the administrative boundary between Bridgend County Borough and the Vale of Glamorgan, with the southern tip being located in the Vale of Glamorgan. The southern area of the site adjoins residential properties in the village of Treoes. The site is irregularly shaped, but is generally flat. It is bounded in the north by existing industrial units on the industrial estate. The site does not have a current access point, but a suitable access could be easily provided from the existing estate road and roundabout.

3.5 Brocastle
NGR SS933777
Site size 46.7 ha/115 acres
Ownership: Welsh Development Agency

3.5.1 The site lies on the south-eastern edge of the urban area of Bridgend. It is bounded to the south, east and west by open countryside, to the west by the Ford engine factory and the Waterton Industrial Estate. It is located alongside the A48, approximately 4.5 miles from the M4 junction 35. A private railway siding serves the Ford plant and forms the boundary between the site and the Waterton Industrial Estate to the north. The site itself comprises gently rolling pasture land divided into medium to large sized fields by hedgerows. Most of the hedgerows are well established and contain substantial trees. The north-eastern boundary of the site is formed by Brocastle Brook. Brocastle Farm lies to the south and a group of dwellings centred around The Paddocks, are located midway along the western boundary with the A48.

3.6 Land adjoining the Ford factory
NGR SS928783
Site size 11.7 ha 28.9 acres
Ownership: Ford Motor Company Limited

3.6.1 The site is located on the southern edge of the urban area of Bridgend. It is bounded in the north by the River Ewenny and the Waterton Industrial Estate and in the east by the Ford plant. Vacant land lies immediately to the west, together with an existing Ford car showroom and the A48 main road. There is a current proposal for a Lidl distribution warehouse development on the vacant land to the west. The southern boundary is formed by the private rail siding leading to the Ford factory. To the south lies the Brocastle development area. The site comprises gently sloping land with scrubby vegetation and a small area of woodland in the northern corner.

3.7 Island Farm
NGR SS898784
Site size 13.4 ha/33.1 acres
Ownership: Bridgend County Borough Council

3.7.1 The site is located on the southern outskirts of Bridgend. It is bounded in the north by the A48, in the west by Merthyr Mawr Road South and in the east by the existing Bridgend Science Park. Open countryside in private ownership extends to the south of the site. The site includes a former World War II prisoner of war camp and the former Crossways Country Club. All the buildings on the site have been demolished, apart from a single building (Hut 9), which has been listed (Grade II) as a building of special architectural or historic interest. The site is well screened by hedges, trees and scrubby vegetation and is generally flat.

3.8 Brackla Industrial Estate
NGR SS915808 and SS923812
Site size 27.5 ha/68 acres
Ownership: Welsh Development Agency

3.8.1 The site is located in east Bridgend and to the south of the village of Coity. It lies within the existing Brackla Industrial Estate, which accommodates mixed industrial development in units of different sizes and variable quality. The western land parcel comprises scrubby land, with some trees and hedgerows, rising gently to the east. A new road link to access the eastern part of the site has been installed from the existing estate roundabout, but is not currently in use. This part of the site is mostly enclosed by existing industrial units and vacant land, with an area of new residential development to the south-west. The eastern land parcel comprises agricultural land, rising gently to the west. The eastern boundary of this land parcel adjoins the industrial estate. However, the northern boundary meets the village of Coity, which has been designated as a Conservation Area. The southern boundary adjoins the existing estate road (Wyndham Close), with a substantial area of residential development extending to the south. Simonston Road forms the eastern boundary. Its T-junction with Wyndham Close is likely to require highway improvements in order to accommodate substantial new development on the site.

3.9 Sarn Park
NGR SS915833
Site size 65.1 ha/160.9 acres
Ownership: public and private owners

3.9.1 The site is strategically located alongside the M4 motorway. It is located in a prominent position to the north-east of Junction 36 of the motorway. The site is currently accessed via the A4061 to Bryncethin, the B4280 and the unclassified road across Hirwaun Common. The villages of Bryncethin and Sarn lie to the north and west respectively, while the town of Bridgend lies on the southern side of the M4. Cefn Hirgoed and Hirwaun Common extend eastwards from the site.

3.9.2 The site covers an extensive area of former common land, but it is understood that common access rights still remain. The northern and eastern boundaries appear as arbitrary lines on the site plan and do not follow any obvious formal boundaries, with the result that the site is irregularly shaped. The western boundary follows the line of the proposed Bryncethin bypass as proposed in the deposit draft of the *Bridgend Unitary Development Plan*, while the southern boundary is formed largely by the M4 motorway. The land is gently undulating and contains large areas of gorse, bracken and grassland which is used for grazing cattle and sheep. A number of public rights of way cross the site, which also contains some archaeological features which are proposed to be scheduled as an ancient monument.

3.10 Land at Tondu
NGR SS891843
Site size 31.4 ha/76.6 acres
Ownership: private

3.10.1 The site is located along the A4063 to the west of the main built-up area of Tondu, approximately 2km north-west of Bridgend. It is roughly triangular in shape, with the land rising steadily across the site from the south-east to north-west. A belt of mature trees forms the northern boundary of the site along the line of a former mineral railway/tramway. A further belt of mature trees follows the southern boundary of the site, along the line of the mineral railway. With the exception of the mature trees on the boundaries, the site is generally featureless, comprising open grassland with some marshy areas. Residential properties are, in general, separated from the site by the A4063 and the railway line. However, a linear residential area along Derllwyn Road and Park Terrace does extend towards the northernmost corner of the site.

3.10.2 The site forms part of a much larger development area, which extends to the north and east and covers the site of the former Tondu Ironworks, brickworks and gas works. It has a long history of industrial development, including a brickworks and mining activity. The NCB undertook opencast mining on the site in the Fountains Opencast to the north of the former brickworks. Private opencast mining also took place during the 1970s when the brickworks were demolished.

3.11 Ty Draw Farm, North Cornelly
NGR SS826815
Site size 6.2 ha/15.3 acres
Ownership: Welsh Development Agency

3.11.1 The site is strategically located immediately to the north-west of Junction 37 of the M4 motorway. The villages of North Cornelly and Pyle lie to the west and north. The site is fully enclosed by the A4229, existing residential development and the M4 embankment to the south. The site slopes steeply from north to south in the northern portion of the site, but is more gently undulating in the south. A thick belt of mature trees screens the eastern boundary of the site. A suitable access to the site could be created off Heol Las, just to the west of the A4229/A48 roundabout.

3.12 Llynfi Power Station
NGR SS885869
Site size 18.8 ha/46.5 acres
Ownership: Morgan Credit

3.12.1 The site of the former Llynfi Power Station is located approximately 5km north-west of Junction 36 of the M4 motorway. The village of Shwt lies to the east and the Georgia Pacific paper mill is located to the north-west on the other side of the Bridgend to Maesteg railway line. The site is relatively flat and is currently accessed via a narrow tree-lined lane off the A4063 and a bridge which crosses the railway. The bridge is substandard and has a current weight restriction of 40 tonnes.

3.12.2 The Bridgend to Maesteg railway bisects the site, creating two land parcels. The land to the south of the railway forms a narrow triangular strip between the road and the railway. The land to the north of the railway is enclosed by the meandering River Llynfi. The site contains a number of redundant buildings, hardstandings, rubble from demolished buildings, cleared and waste ground. Mature trees line the banks of the river. Japanese Knotweed has also been identified on the site.

3.13 Wern Fawr
NGR SS956836
Site size 54.9 ha/135.7 acres
Ownership: Bridgend County Borough Council and private owners

3.13.1 The site is located approximately 1.5km to the north-west of the town of Pencoed. It is bounded in the south by the B4280. The majority of the northern boundary is formed by the line of a dismantled railway. The remainder of the northern and western boundaries follow existing field boundaries. The eastern boundary is formed in part by the line of a small stream and the unclassified road leading to Wern Tarw.

3.13.2 An existing industrial development, the Rockwool factory, lies immediately to the north. A small number of residential properties are located to the north-east at Wern Tarw and the village of Heol-y-Cyw lies a short distance to the west. An existing residential property, Brynwith Crossing, lies within the site close to the northern boundary. The private access to the property extends due north from the B4280 across the site. The site is gently undulating agricultural land, rising steadily to the north. It contains a number of mature hedgerows and trees. Part of the site is also common land, forming part of the Coity Wallia Common. Historical land uses on the site include opencast mining and traditional underground mining. A number of public rights of way cross the site.

4.0 Site evaluation methodology

Methodology

4.1 One of the principal aims of the study is to develop a methodology and a clear scoring system for evaluating the thirteen sites. The scoring system is based on a large number of criteria, which have been grouped into four sets as follows:

- Environmental impact;
- Economic impact;
- Social impact;
- Deliverability.

4.2 For each category of indicators, a scoring system involving a range of scores within the range -5 and +5 has been devised, where:

- -5 represents a very low score, indicating a major constraint to development.
- 0 represents a moderate or neutral impact; and
- +5 represents the highest score, indicating positive advantages and a lack of constraints to development.

4.3 Details of the scoring system for each main category are provided in **Tables 10, 12, 14** and **16**. Sites may be awarded any score within the overall range for that indicator. As the number of criteria varies for each category, the total potential score for each category also varies. The maximum score for each category is indicated in **Tables 10, 12, 14** and **16**. The detailed information for each site, on which the scores have been awarded, is provided in **Appendices 1 to 5** in **Volume 2** of the report. The scores are summarised in **Tables 11, 13, 15** and **17** in **Volume 1**.

4.4 The criteria for each category are not listed in any particular order of priority. The scoring system does not incorporate an additional weighting system as it was agreed with the client group that there was no objective reason for assigning greater weights to certain categories. However, it should be noted that the economic data derived from the *Welsh Index of Multiple Deprivation,* 2000 does include in-built weighting. Both income deprivation and employment deprivation were assigned weights of 25% each in the index; that is, these two factors were weighted as 50% of the total number of factors.

4.5 The scores within each main category are totalled to provide an overall total for that category. These summary scores are included in **Table 18**. As the indicators measure a wide range of very different criteria, the final summary scores <u>should not be totalled</u>.

5.0 Environmental impact

5.1 Information on the environmental indicators is contained in **Appendix 1** of **Volume 2** of the report. The sites have been scored according to the environmental information available and on the basis of the system presented in **Table 10** below. The scores for each site are summarised in **Table 11** overleaf.

Table 10
Environmental impact scoring system

Criteria	**Range of scores**			
Ecology: Protected species International/national designations Local designations	 No protected species No sites No sites	 +5 +5 +2	 Protected species Designated sites Designated sites	 -5 -5 -2
Landscape designations: National designations Special landscape area/Green wedge	 No sites No sites	 +5 +3	 Designated sites Designated sites	 -5 -3
General landscape/visual impact	Beneficial impact	+5	High adverse impact Medium adverse impact Low adverse impact	-5 -3 -1
Archaeology and cultural heritage: Scheduled Ancient Monuments Listed buildings Sites & Monuments Record entry	 No sites None None	 +5 +5 +2	 Scheduled sites Listed buildings SMR records	 -5 -5 -2
Public rights of way	No rights of way	+5	Rights of way present (depending on no.)	-1 to -5
Flooding and hydrology	Located outside floodplain	+5	Located within floodplain	-5
Air quality and noise	No adverse air quality or noise implications	+5	Adverse air quality or noise implications	-5
Maximum possible score		**+52**		**-52**

Table 11 **Scores for environmental indicators**

Criteria/Sites	Ecology	Landscape designations	Landscape/visual impact	Archaeology & cultural heritage	Public rights of way	Flooding & hydrology	Air quality & noise	**Total score of a maximum score of 52**
Pencoed Technology Park, Pencoed	4	8	-1	8	5	-5	0	**19**
The Triangle, Pencoed	1	8	-1	12	-2	-3	-3	**12**
Waterton Industrial Estate (Site A)	12	8	-3	12	5	5	-3	**36**
Waterton Industrial Estate (Site B)	12	8	-3	12	5	-1	-3	**30**
Brocastle	2	8	-3	12	-2	-1	-2	**14**
Land adjoining the Ford factory	7	8	-1	12	5	-2	0	**29**
Island Farm	2	8	-3	-2	5	5	-2	**13**
Brackla Industrial Estate	12	8	-1	12	5	5	0	**41**
Sarn Park	3	8	-5	8	-5	5	0	**14**
Land at Tondu	12	8	0	1	-5	5	3	**24**
Ty Draw Farm	8	8	-3	12	5	5	-3	**32**
Llynfi Power Station	12	8	5	8	5	-3	0	**35**
Wern Fawr	8	8	-5	8	-5	5	-3	**16**

6.0 Economic impact

6.1 Information on the economic indicators is contained in **Appendices 2 and 3** of **Volume 2** of the report. The sites have been scored according to the economic information available and on the basis of the system presented in **Table 12** below. The scores for each site are summarised in **Table 13** overleaf.

Table 12
Economic impact scoring system

Criteria	**Range of scores**			
Number of jobs	High number of jobs potentially created	+5	Small number of jobs potentially created	0
Total unemployment	High unemployment	+5	Low unemployment	0
Availability of labour	High male unemployment High female unemployment	+5 +5	Low male unemployment Low female unemployment	0 0
Availability of financial grants	Objective 1 funding available, but competition with neighbouring authorities	+3	Objective 1 funding is available throughout the Borough	
Cluster development	Number of sites clustered together Location outside cluster, but strategic road access	+4 +2	Sites remote from others	-4
Impact on local community (multiplier effect)	High potential multiplier effect in areas with high unemployment	+5	Low potential multiplier effect in areas with low unemployment	0
Agricultural land	Lower grade land	+5	Best & most versatile land	-5
Access to markets	Direct access to M4	+5	Remote from M4	-5
Ability of site to accommodate a major development of regional significance	Site able to accommodate a major development	+5	Site unlikely to accommodate a major development	0
Maximum possible score		**47**		**-14**

Table 13 **Scores for economic indicators**

Criteria/Sites		Availability of labour (total unemployment)									Total score out of a maximum score of 47
	Number of jobs	Total unemployment	Male unemployment	Female unemployment	Availability of financial grants (RSA)	Cluster development	Impact on local community (multiplier effect)	Access to markets	Agriculture	Ability to accommodate a development of regional significance	
Pencoed Technology Park, Pencoed	3	5	4	5	3	4	5	5	0	5	**39**
The Triangle, Pencoed	1	5	4	5	3	4	5	5	-5	0	**27**
Waterton Industrial Estate (Site A)	0	0	0	0	3	4	0	3	0	0	**10**
Waterton Industrial Estate (Site B)	0	0	0	0	3	4	0	3	5	0	**15**
Brocastle	4	0	0	0	3	4	0	2	5	5	**23**
Land adjoining the Ford factory	1	0	0	0	3	4	0	2	5	0	**15**
Island Farm	1	5	4	4	3	3	5	0	5	0	**30**
Brackla Industrial Estate	2	1	1	1	3	4	1	3	5	0	**21**
Sarn Park	5	3	3	1	3	2	3	5	5	5	**35**
Land at Tondu	3	1	1	1	3	-2	1	2	5	0	**15**
Ty Draw Farm	0	5	5	3	3	-4	5	5	-5	0	**17**
Llynfi Power Station	1	1	1	1	3	-4	1	-4	5	0	**5**
Wern Fawr	5	5	4	5	3	-4	5	-2	5	5	**31**

7.0 Social impact

7.1 Information on the social indicators is contained in **Appendices 2 and 4** of **Volume 2** of the report. The sites have been scored according to the social information available and on the basis of the system presented in **Table 14** below. The scores for each site are summarised in **Table 15** overleaf.

Table 14
Social impact scoring system

Criteria	**Range of scores**			
Numbers unemployed	High unemployment	+5	Low unemployment	0
Multiple deprivation index summary domain	High index of deprivation	+5	Low index of deprivation	0
Population by gender	There are more women than men in most electoral divisions, but female unemployment is lower than male unemployment. A neutral score of 0 has been awarded as both men and women are equally important in the workforce.			
Rail services	Under 5km 1.5 – 3km	+5 0	Over 5km	-5
Bus services	Regional & local services Local services only Regional services only	+5 +2 +1	No services	-5
Pedestrians and cyclists	Good existing/potential access	+5	Poor existing/potential access	-5
Child poverty domain	High child poverty deprivation index	+5	Low child poverty deprivation index	0
Equal opportunities. Addressing needs of disadvantaged & advantaged areas.	There is a need to address the needs of advantaged areas as well as the disadvantaged areas. Therefore a neutral score of 0 has been awarded to all sites.			
Maximum potential score		**+30**		**-15**

Table 15 **Scores for social indicators**

Criteria/Sites			Accessibility						
	Numbers unemployed	Multiple deprivation index summary domain	Population by gender	Rail services	Bus services	Pedestrians and cyclists	Child poverty domain	Address needs of disadvantaged & advantaged areas	**Total score out of a maximum score of 30**
Pencoed Technology Park, Pencoed	5	1	0	5	5	-3	1	0	**14**
The Triangle, Pencoed	5	1	0	5	5	-2	1	0	**15**
Waterton Industrial Estate (Site A)	0	0	0	0	-5	-5	0	0	**-10**
Waterton Industrial Estate (Site B)	0	0	0	0	-5	-5	0	0	**-10**
Brocastle	0	0	0	0	1	-4	0	0	**-3**
Land adjoining the Ford factory	0	0	0	0	1	-4	0	0	**-3**
Island Farm	5	1	0	0	-5	5	2	0	**8**
Brackla Industrial Estate	1	1	0	5	5	5	1	0	**18**
Sarn Park	3	3	0	5	5	-5	4	0	**15**
Land at Tondu	1	3	0	5	2	5	2	0	**18**
Ty Draw Farm	5	5	0	5	5	4	5	0	**29**
Llynfi Power Station	1	4	0	0	2	-5	4	0	**6**
Wern Fawr	5	2	0	0	2	-5	2	0	**6**

8.0 Deliverability

8.1 Information on the deliverability indicators is contained in **Appendix 3** of **Volume 2** of the report. The sites have been scored according to the information available and on the basis of the system presented in **Table 16** below. The scores for each site are summarised in **Table 17** overleaf.

Table 16
Deliverability scoring system

Criteria	Range of scores			
Planning status	Extant planning permission for employment/ Development plan allocation	+5	Unhelpful planning history of non-employment uses/ No development plan allocation	-5
Legal constraints & ownership	Single ownership	+5	Multiple/complex ownership	-5
Ground conditions	No difficult ground conditions	+5	Difficult ground conditions	-5
Contamination	No contamination	+5	Severe contamination	-5
Infrastructure	Existing infrastructure	+5	No existing infrastructure	-5
Foul drainage	No capacity/availability problems	+5	Major capacity/ availability problems	-5
Surface water drainage	No capacity/availability problems	+5	Major capacity/ availability problems	-5
Utility services	No capacity/ availability restrictions	+5	Capacity/availability restrictions	-5
Topography	Flat site	+5	Steeply sloping	-5
Timescale	Deliverable within five years	+5	Deliverable only in longer term	-5
Maximum possible score		**+50**		**-50**

Table 17 Scores for deliverability indicators

Criteria/Sites	Planning status	Legal & ownership	Ground conditions	Contamination	Infrastructure	Foul drainage	Surface water drainage	Utility services	Topography	Timescale	**Total score out of a maximum score of 50**
Pencoed Technology Park, Pencoed	5	5	5	5	-5	-5	-5	5	5	5	**20**
The Triangle, Pencoed	5	-1	5	5	-5	5	-2	3	5	5	**25**
Waterton Industrial Estate (Site A)	3	5	-1	5	2	5	5	2	5	5	**36**
Waterton Industrial Estate (Site B)	3	5	-1	5	2	5	5	2	5	2	**33**
Brocastle	5	5	-2	5	-4	-5	3	-3	-3	3	**4**
Land adjoining the Ford factory	5	-3	5	5	-4	-5	-5	1	-1	2	**0**
Island Farm	5	5	-3	-2	-5	-2	2	3	5	3	**11**
Brackla Industrial Estate	5	5	-3	-4	-2	5	4	5	3	3	**21**
Sarn Park	5	-5	0	5	-5	-5	-5	-5	-3	-3	**-21**
Land at Tondu	3	-1	-5	-2	-5	3	-3	1	-3	-2	**-14**
Ty Draw Farm	5	5	5	5	-5	-5	2	2	-1	3	**16**
Llynfi Power Station	5	5	-4	-3	-5	-5	1	-1	0	-5	**-12**
Wern Fawr	5	-5	-5	0	-5	-5	-5	2	3	-3	**-18**

9.0 Conclusion

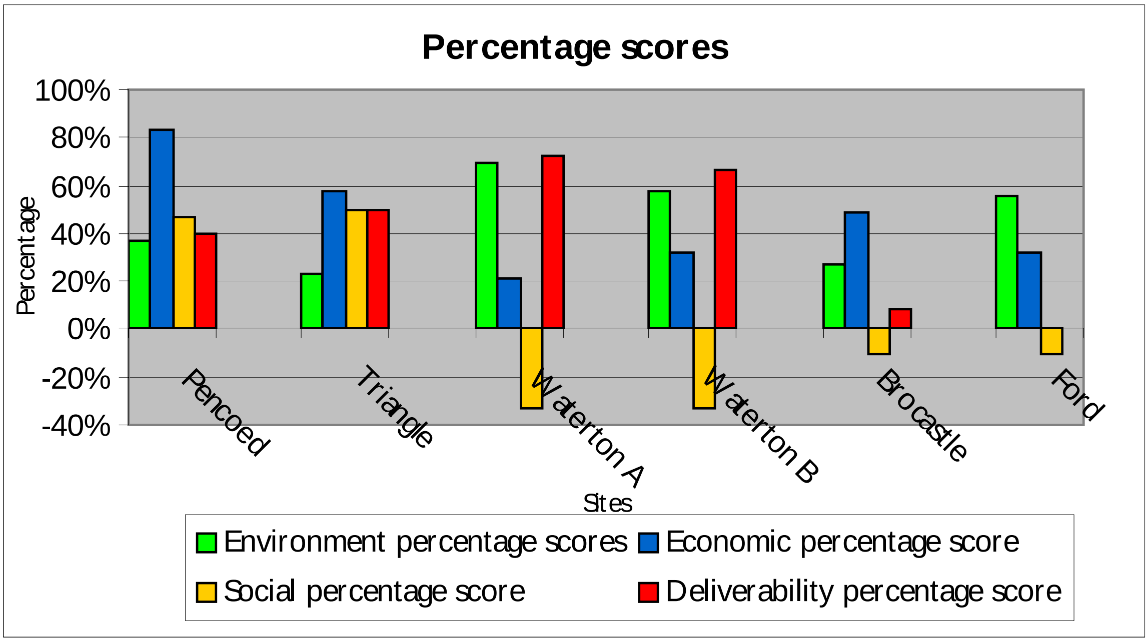
9.1 Summary evaluation

9.1.1 The summary scores from the evaluation process are included in **Table 18**. As the indicators measure a wide range of very different criteria, the final summary scores should not be totalled. The scores are illustrated graphically in **Figures 11** and **12** and the sites are ranked in **Table 19**.

Table 18
Summary evaluation and percentage scores

Site	Env. Indicators Max. score 52	Env. Indicators % score	Economic impact Max. score 47	Economic % score	Social impact Max. score 30	Social % score	Deliver. Indicators Max. score 50	Deliver. % score
Pencoed Technology Park, Pencoed	19	37%	39	83%	14	47%	20	40%
The Triangle, Pencoed	12	23%	27	57%	15	50%	25	50%
Waterton Industrial Estate (Site A)	36	69%	10	21%	-10	-33%	36	72%
Waterton Industrial Estate (Site B)	30	58%	15	32%	-10	-33%	33	66%
Brocastle	14	27%	23	49%	-3	-10%	4	8%
Land adjoining the Ford Factory	29	56%	15	32%	-3	-10%	0	0%
Island Farm	13	25%	30	64%	8	27%	11	22%
Brackla Industrial Estate	41	79%	21	45%	18	60%	21	42%
Sarn Park	14	27%	35	74%	15	50%	-21	-42%
Land at Tondu	24	46%	15	32%	18	60%	-14	-28%
Ty Draw Farm, North Cornelly	32	62%	17	36%	29	97%	16	32%
Llynfi Power Station	35	67%	5	11%	6	20%	-12	-24%
Wern Fawr	16	31%	31	66%	6	20%	-18	-36%

Figures 11 and 12
Summary evaluation percentage scores



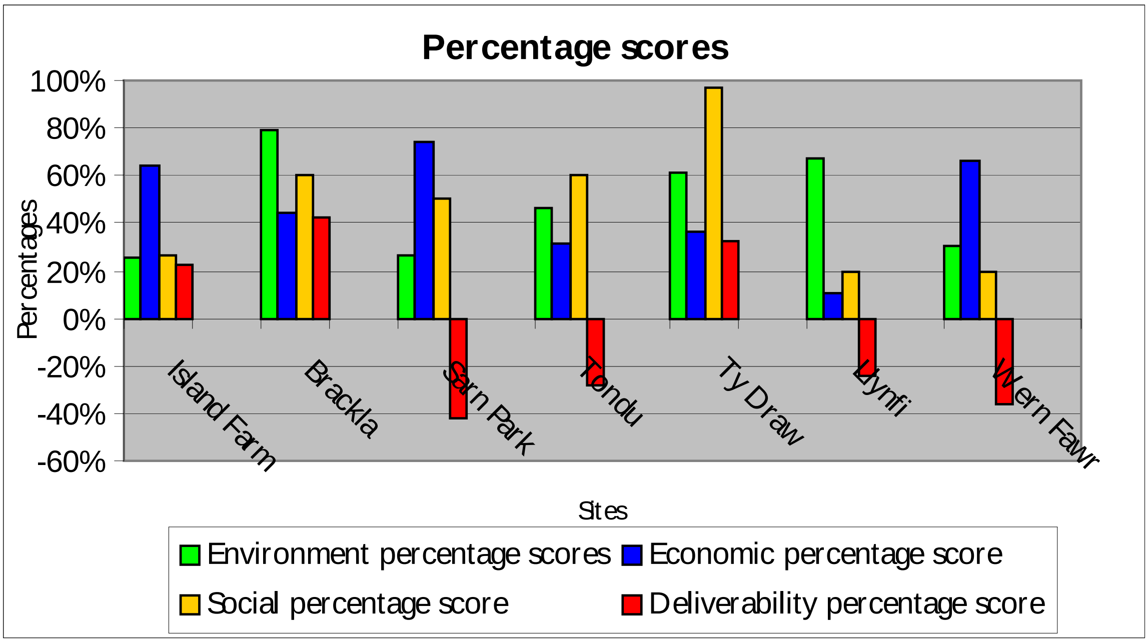


Table 19
Site evaluation percentages and ranking

Rank	Environmental indicators (%)		Economic impact (%)		Social impact (%)		Deliverability indicators (%)	
1	Brackla	79	Pencoed	83	Ty Draw	97	Waterton A	72
2	Waterton A	69	Sarn Park	74	Brackla	60	Waterton B	66
3	Llynfi	67	Wern Fawr	66	Tondu	60	Triangle	50
4	Ty Draw	62	Island Farm	64	Sarn Park	50	Brackla	42
5	Waterton B	58	Triangle	57	Triangle	50	Pencoed	40
6	Ford	56	Brocastle	49	Pencoed	47	Ty Draw	32
7	Tondu	46	Brackla	45	Island Farm	27	Island Farm	22
8	Pencoed	37	Ty Draw	36	Llynfi	20	Brocastle	8
9	Wern Fawr	31	Tondu	32	Wern Fawr	20	Ford	0
10	Sarn	27	Waterton B	32	Brocastle	-10	Llynfi	-24
11	Brocastle	27	Ford	32	Ford	-10	Tondu	-28
12	Island Farm	25	Waterton A	21	Waterton A	-33	Wern Fawr	-36
13	Triangle	23	Llynfi	11	Waterton B	-33	Sarn Park	-42

9.2 Conclusions and recommendations

Our conclusions and recommendations on each site are set out below:

Pencoed Technology Park, Pencoed

9.2.1 This site scores extremely well on economic impact criteria and, in the short term, it offers the best opportunity for Bridgend to create a site capable of attracting a prestige project of regional significance. It is a high profile site with excellent motorway access, capable of serving a wide catchment area as well as Bridgend itself. A substantial proportion of the site is located in the notional floodplain determined by the Environment Agency, and this accounts in large part for its relatively poor environmental score. The extent of the developable area is dependent upon resolving the floodplain issue and this should be given priority in the site planning process. Much of the site is located in Rhondda Cynon Taff County Borough and co-operation with that council will be necessary to ensure that the site is brought forward for development in a reasonable timescale. As the land is already in public ownership, such co-operation should focus initially on removing the planning restriction to Sony-related development, which is no longer appropriate now that Sony’s option on the land has lapsed. The site is likely to be financially viable.

The Triangle, Pencoed

9.2.2 The employment component of this site is relatively small as it is intended to accommodate a mixed-use development. As the other principal use is housing, this will preclude a general industrial (Class B2) use, but the site is well suited to a high quality business, industrial or office use. Again, it is a well located, high profile site, which could be developed in the short term and is likely to be financially viable. A private sector developer has assembled and promoted the site and its planning status is now confirmed. We understand that a small part of the site remains in a different ownership; if this were to present an intractable impediment to bringing the site forward for development, the WDA Land Division could be asked to consider resolving that difficulty.

Waterton Industrial Estate (Site A)

9.2.3 This site scores well on environmental and deliverability indicators, but poorly on economic and social impact indicators. Being at the back-end of the Waterton Industrial Estate, it is not strategically located, but its profile would be enhanced if and when the Waterton-Brocastle link road is constructed. As that proposal is some years away, there is little point in delaying development until that time, although it is important that the layout of the development does not preclude that option from being achieved. Although the site is regarded as part of the Waterton Industrial Estate, it does not currently have planning permission for business and industrial use and the site's proximity to the village of Treoes could well lead to objections at the planning stage. A substantial proportion of the site (that part closest to Treoes) is located in the Vale of Glamorgan Borough. It would be prudent, first, to obtain planning permission only for that part of the site located in Bridgend County Borough, leaving the remainder to be pursued at a later date if appropriate. Meanwhile, the WDA should consider undertaking advance planting on the land closest to the village to create an effective screen. As a result of the high infrastructure costs the site has very poor financial viability, although this would be improved somewhat if Sites A and B were to be developed concurrently.

Waterton Industrial Estate (Site B)

9.2.4 Our comments on this site are the same as for Site A except that:

- Site B is not affected by the proposed Waterton-Brocastle link road; and
- Only a small part of Site B is located in the Vale of Glamorgan Borough. As this part of the site is contiguous with the village of Treoes, the WDA should consider undertaking an advance planting scheme on the whole of that land with a view to establishing a substantial landscape screen between Site B and the houses in Treoes.

Brocastle

9.2.5 The Brocastle site does not perform particularly well on most of the indicators. On the positive side, the land has already been assembled into public ownership, planning permission obtained and infrastructure works designed. It is ready for site preparation works. Although not directly related to the M4 motorway, the site has good access and could be suitable for either a single user or a small number of medium size users. The latter is more likely, given the topography of the site and the WDA's wish to allow for the possibility of extending the site access road through the site and adjoining land to link with the A473 via the Waterton Industrial Estate. Subject to a decision to invest in site preparation works, the site is capable of accommodating substantial development in the short term. Although the financial viability of the site is poor, it is a major site, which represents an early opportunity to create a big modern site in Bridgend. The attraction of the site would be further enhanced when the Waterton-Brocastle link road is constructed.

Land adjoining the Ford factory

9.2.6 We have had access to very little information on this site, which appears not to have been the subject of a detailed study. A planning application submitted on behalf of

Ford (which owns the site) in May 2000 remains undetermined because the applicant has not submitted the required environmental statement. The site is relatively small and, due to constraints, the developable area might be significantly reduced. The site is not strategically located and has a limited identity, but could be suitable for a development of mid-range industrial units. The site is likely to have marginal financial viability.

Island Farm

9.2.7 The Island Farm site is closer to the main urban area than some of the other major employment sites in Bridgend (eg Pencoed Technology Park). Whilst the location is not ideal for a single prestige industrial user, the site benefits from a semi-rural environment and its proximity to the Bridgend Science Park and, with its A48 frontage, would have a higher profile than it. This profile would be much enhanced if the WDA's proposal to build a Technium project there proceeds and, in the long term, if the aim of linking the site with the Bridgend Science Park is achieved. The site scores poorly on environmental indicators and there are nature conservation issues to resolve. Nevertheless, it would be very suitable for a campus-type office or business park development, although this market would need to be supply-led.

Brackla Industrial Estate

9.2.8 In reality, this is a series of sites rather than a single site, only some of which will be brought forward for development for employment uses. The eastern block of land includes the line of the Coity Bypass and this substantially reduces the amount of developable land in that area. Brackla is an old estate of relatively low quality, which is much in need of infrastructure and environmental improvement and the creation of a sense of identity. It would be best if this could be achieved before these sites were released. Development is likely to take the form of a mixture of uses, following the improvements referred to above.

Sarn Park

9.2.9 Sarn Park is a large and very important site, strategically located next to Junction 36 of the M4 motorway. The employment component of the proposal is undefined, but could be substantial and could certainly be significant. We have had access to only limited information on this site. Based on available data, the site scores highly on economic and social impact criteria, but is ranked lowest in terms of deliverability. There are significant planning and legal issues to be resolved. The site is a good long term prospect, subject to resolving the difficulties associated with bringing the site forward for development. Substantial infrastructure works would be necessary including the remodelling of Junction 36. The economics of the development will be highly sensitive to the scale and mix of land uses, particularly retail.

Land at Tondu

9.2.10 The site at Tondu scores relatively highly on social impact, but less well on all other criteria. It is located in an area of low demand with unfavourable characteristics of access, topography and ground conditions. It is unlikely to be developed quickly and could be used as the site for workshops and other small scale employment uses.

Financial viability is poor and could be improved if part of the site were to be used for housing in order to cross-subsidise the employment component.

Ty Draw Farm

9.2.11 This site performs very well in relation to social impact criteria, being located in a relatively disadvantaged area (as measured by the *Welsh Index of Multiple Deprivation*) and relatively well on environmental criteria. Although close to Junction 37 of theM4 motorway and having a frontage to the A4229, the site does not have a high profile, being obscured by a substantial belt of mature trees. The site has been allocated for employment development for many years and had been extensively marketed by the WDA for that purpose, but without success. Due to the proximity of a large area of existing housing, any employment development on the site would be restricted to Class B1 users and would be isolated. The site has very poor financial viability. Given this and the adverse marketing history of this site, we have concluded that the prospects for securing such a development are poor and that the site would be better used for residential development. We understand that the WDA Land Division would be prepared to use the proceeds from a residential development of the site to support the development of better-located employment sites elsewhere in Bridgend, such as Sarn Park.

Llynfi Power Station

9.2.12 Llynfi is the worst performing site on economic criteria and it does not perform particularly well on the basis of social impact and deliverability either. Financial viability is very poor. The fact that it is a brownfield site enhances its environmental score. As with the site at Tondu, it is located in an area of low demand and in a relatively isolated setting. The site may be appropriate for unattractive or 'bad neighbour' uses, but it is likely to be developed only in the long term. Restoration of this derelict site is probably necessary in any event.

Wern Fawr

9.2.13 Apart from Sarn Park – where the intention is to create a mixed-use development – Wern Fawr is the largest of the sites that we have considered. Its size and topography are such that the site could accommodate a very large user; and, in view of the absence of extensive residential development nearby, the site may be appropriate for a general industrial (Class B2) use. Although the site is not adjacent to the M4 motorway, the B4280 could be improved to create a high quality easy access from Junction 35. There are significant issues associated with deliverability (eg common land), which would need to be addressed before the site could be regarded as available for development, and these are such that the prospect of development must be regarded as long term. Financial viability is marginal. A decision about whether the WDA should invest in this site should be taken in the context of a study of regionally important employment sites in the M4 corridor and we understand that such a study is currently under commission from the WDA.

9.2.14 **Table 20**, which follows, summarises our view of the sites by category of development and the timescale in which they are likely to be developed. The categories of timescale that we have employed are as follows:

• Short term	0-5 years
• Medium term	5-10 years
• Long term	10+ years.

Table 20
Site categories and timescales

Category	List of sites	Timescale
High quality prestige sites (large)	Pencoed Technology Park Sarn Park (mixed use development)	Short-medium Medium-long
High quality prestige sites (small)	Island Farm Triangle site	Short-medium Short
General industrial sites (large)	Brocastle Wern Fawr Llynfi Power Station	Short Medium-long Long
General industrial sites (small)	Waterton (A & B) Brackla Industrial Estate Land at Tondu Land adjoining the Ford factory	Short-medium Short-medium Medium Medium
Sites suitable for alternative uses (for example, residential)	Ty Draw Farm	Long*

* Long if employment use is to be retained.

9.2.15 We have emphasised elsewhere in this report the desirability of Bridgend having available a selection of sites to meet differing requirements. Based on the categories set out in **Table 20**, our recommendations for site investment by the public sector in the short term (that is, 2001-06) are as follows:

- High quality prestige site (large) Pencoed Technology Park
- High quality prestige site (small) Island Farm
- General industrial site (large) Brocastle
- General industrial site (small) Brackla Industrial Estate.

9.2.16 In the medium to long term, we recommend that consideration be given to investing in the Sarn Park and Wern Fawr sites, subject to further consideration of their respective land use components and roles. Neither of these sites appears to have been the subject of a detailed feasibility study by the WDA, which we would regard as a pre-requisite for a decision as to whether or not to actively promote these sites. In the case of Wern Fawr, it is one of several large scale employment sites in the M4 corridor and, as noted above, its role should be considered from a regional perspective.

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11.0 Site Plans